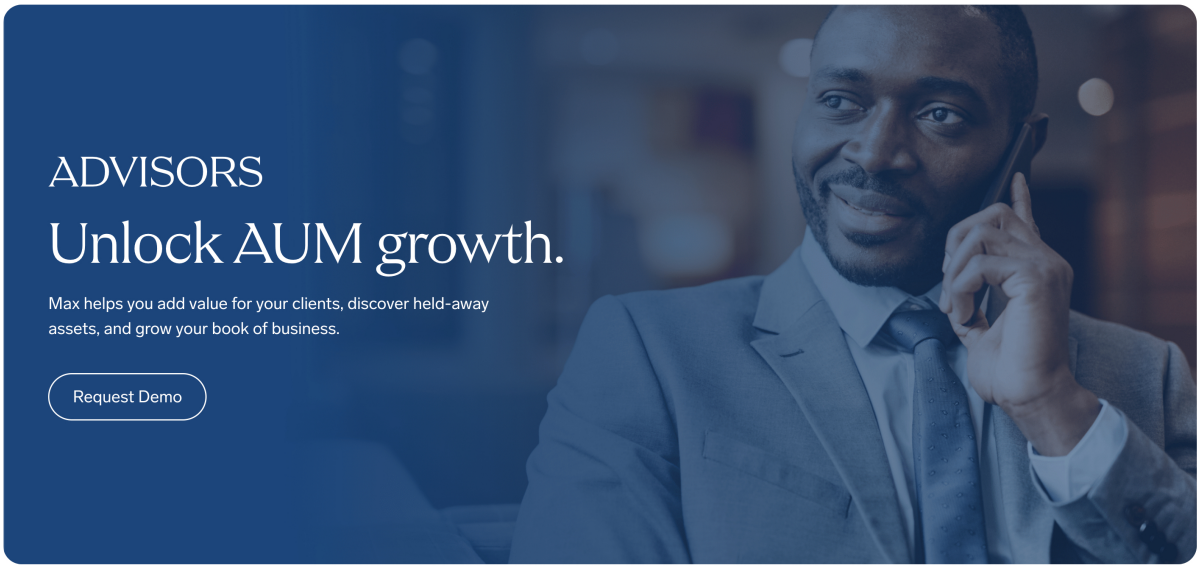

ADVISORS

Unlock AUM growth.

Max helps you add value for your clients, discover held-away assets, and grow your book of business.

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Designed for financial professionals and their clients.

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Rated as the leading cash solution for independent advisors five years in a row.

Elevate your practice, expand your service offerings, and make a greater impact on your clients' financial futures with Max.

According to the Capgemini 2024 World Wealth Report, the average high net worth household in North America keeps 24% of their liquid assets in cash. But most of this cash sits outside of the client's investment portfolio.

Max is an intelligent, innovative cash management solution that brings held-away cash into view while helping your clients earn more on their cash without compromising safety or liquidity.

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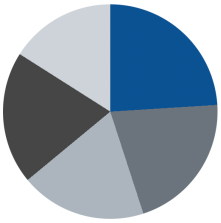


Unlock new financial growth opportunities for yourself and your clients.

Value Added Service: Expand your financial services offering, adding value to your clients and setting you apart.

Strengthen client relationships: Build trust by offering your clients a superior approach to cash management.

Gain Visibility into Held-Away Assets: Get a clear pictures of your clients' full financial picture.

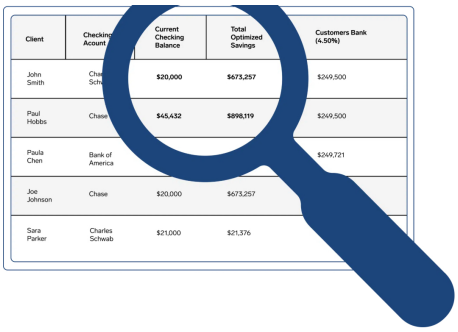
Maximize Growth: Grow your business and your AUM.

The Max Advisor Dashboard

By registering for the Max Advisor Dashboard, you can easily track account balances across all your clients' linked checking and savings accounts no matter what reporting or planning software you use.

Max also offers enterprise solutions for large wealth management firms. Contact us for more information.

Contact Us



Client Handout

Download a one page overview of Max to share with your clients.

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Seamless integrations with many leading financial planning and reporting tools.

Financial Planning

eMoney Advisor · ENVESTNET MoneyGuide · RightCapital

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Max is a participant in Schwab Advisor Services Provider Listings

Leading wealth management firms use Max.

Trusted by industry leaders to optimize wealth and deliver results.

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Trusted by more than

3,000

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True stories, real impact.

What our clients have to say about Max.

"Max is our secret weapon for assisting clients—it helps secure higher returns on their cash effortlessly. With Max, they earn more than they ever could on their own, making our team look good."

LeGrand Redfield, President and CEO, Asset Management Group

"Most clients know they could be earning more on their cash but feel stuck or overwhelmed by the process. By showing clients how Max can boost their savings, I help them take action to increase their interest income."

Tim Harrington, Founder, Longview Financial Advisors

Questions, Answered.

Don't see your question answered? Check out our FAQ or contact us at advisors@maxmyinterest.com.

- What is Max? +
- How does Max work? +
- How do Optimizations work? +
- What is Max Checking? +
- How much can clients earn? +
- What does Max cost? +
- How safe are client funds? +
- How do Transfers work and how long do they take? +
- What is the setup process? +
- What happens at Tax time? +
- Is Max secure? +

How do I contact Max? +

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